FILING A SF 278 REPORT

This guide covers the basic steps for filing, viewing and amending a SF 278 report in FDM.

Creating a SF 278 Report

To create a new SF 278 report:

1. On the **My Reports** tab, click **Add New Report**.

Getting Started

2. Review the information on the screen and then click **Continue.**

Report Status

3. Select the appropriate Report Status and click **Continue.**

The following screens vary depending upon the Reporting Status you selected.
- Incumbent filers select the year covered by this report.
- New Entrant filers select if you are a Reserve Component General Officer and then enter your appointment date.
- Termination filers select their Termination Date.

The SF 278 has four different report statuses:

Incumbent	Select **Incumbent** if you filed a report in the previous year and are still in the same position as when you filed your last disclosure report. An Incumbent report is due annually, no later than May 15th following the covered reporting calendar year.
New Entrant	Select **New Entrant** if this is the first time you are filing a disclosure report. The new Entrant report must be filed within 30 days of assuming a new position.
Termination	Select **Termination** if you are leaving a covered position, which required you to file a SF 278.
Incumbent/ Termination	Select **Incumbent/Termination** if you anticipate leaving your covered position within 90 days after the May 15th annual deadline and have requested and received an agency extensions.

Checkpoint

4. If you do not have any existing reports in FDM, the checkpoint page displays a reminder message regarding the date this report is due. Review the information on the screen and then click **Continue.**

Pre-Populate Report

FDM simplifies the maintenance of financial disclosure reports by allowing you to carry over any previously entered financial disclosure reporting information when creating new reports.

5. Select an existing report to pre-populate this report or select Don't Prepopulate and click **Continue**.

6. Review the Due Date, Contact Information pages and click **Continue**. The report now has a draft Review Status.

Position History

You must list all covered positions held with the Federal Government during the applicable reporting period.

7. Click **Add New Position** to add information about the position for which you are filing this disclosure report otherwise, click **Continue.**

Attaching a Job Description

8. Click **Add Job Description** to upload a Job Description if necessary, otherwise, click **Continue**.

Report Data

Information in the Report Data sections relates to the filer, spouse and dependent children. You must click through all sections of the SF 278 being sure to select **No** even if you do not have any information to disclose for that section.

The process for entering report data is the same no matter what type of information you need to report. For example, on the Assets page, if you have reportable assets follow the steps listed below.
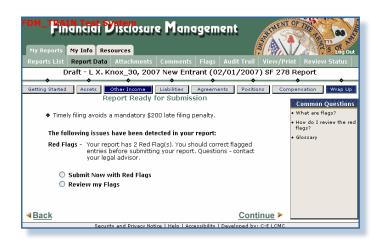
Assets

9. Select **Yes,** and then click **Continue.**

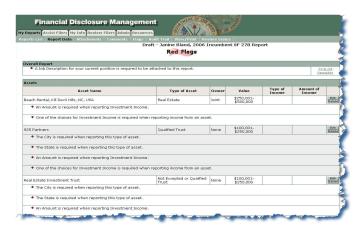10. Type the appropriate asset information and click **Save.**
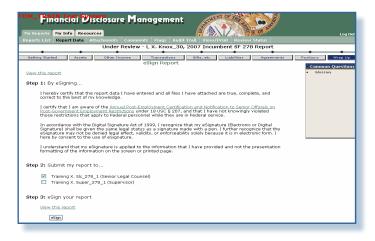
Underlying Assets

Report any underlying assets that you would be required to report if held individually rather than as part of the plan.

11. Be sure to click **Add Underlying Asset** beside the appropriate asset on the Assets page or be sure **"This is an Underlying Asset"** is selected on the Add Asset page.

The following Report Data sections are included in the SF 278 financial disclosure report.

- Other Income
- Transactions- New Entrant and Nominee filers do not have to complete the Transaction section of the SF 278 disclosure report.
- Gifts
- Liabilities
- Agreements
- Positions
- Compensation - Only New Entrant and Nominee filers must complete the Compensation section of the SF 278 disclosure report.

Wrap-Up

During Wrap-up, FDM alerts you of any incomplete or missing information.

Review your report flags and correct any errors before submitting your report. A red flag indicates required information is missing and that it should be provided before the report is submitted. A yellow flag indicates that information is missing but is not required in order to submit your report. SF 278 Filers can submit the report with the errors if you must meet a deadline.

Reviewing Flags

12. Select **Review My Flags** and click **Continue**.

13. Click **Edit** beside any flagged area to adjust that entry.

14. When complete, click **Wrap-Up**. The Report Ready for Submission page is displayed.

Report Ready for Submission

15. On the Report Ready for Submission page, select **Submit Now** to submit your report for review to your Senior Legal Counsel and Supervisor.   Click **Continue**.

Note: You can also opt to select **Submit Later** if you cannot complete your report at this time.

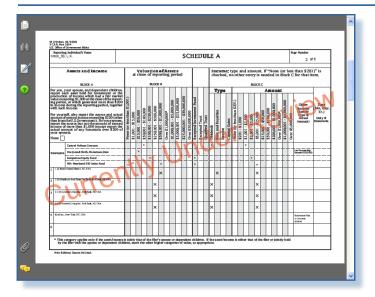### eSigning a SF 278

16. Select the reviewer(s) who will review your report and then click **eSign**.

Note: Click **View this Report** to view and print your report prior to submission.

An e-mail message is sent to your selected reviewers indicating that your report is awaiting their review.

Viewing and Printing Your Report

At any time, you can view and print your financial disclosure report.

1. On the **My Reports | Reports List** page, select the appropriate report.

2. Click **View/Print** and then click **View/Print** again. The financial disclosure report displays in a separate browser window.
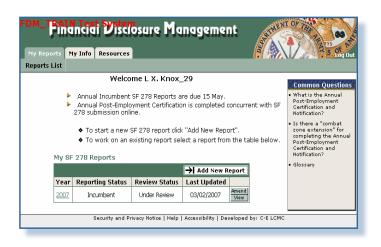
Printing a Report

3. Select **File | Print** and then click **Print.**

Amending a SF 278 Report

Amending a report voids your last digital signature on the SF 278 report. You must digitally sign the SF 278 report again once your amendments are complete. FDM notifies all the reviewers who completed an initial review of your report prior to this amendment informing them that your SF 278 report has changed since it was last submitted.

As with drafting or editing your SF 278 report, you must go to Wrap-Up to complete the amendment process. During Wrap-Up, you must Re-certify your changes and re-sign your report.

1. On the Reports List Page, click **Amend** beside the appropriate SF 278 report.

2. Make the appropriate additions/corrections.

3. When complete, click **Wrap-Up**. The Report Ready for Submission page is displayed.

4. Submit and eSign your report.

Comments

Comments can be added to specific line items or to the SF 278 report itself as substantive or non-substantive comments.

Adding a Line Item Comment

1. Click **Add a Comment** beside the appropriate line item you added. The Add Comment page is displayed

2. Type the appropriate information and click **Save.**

Adding a Report Comment

1. Click **Comments** in the My Reports submenu. The Comments page displays.

2. Click **Add Report Comment.**

3. Type the appropriate information and click **Save**.